



Filing ID #10025051

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Dr. Mark Green  
**Status:** Congressional Candidate  
**State/District:** TN07

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2018  
**Filing Date:** 01/25/2019  
**Period Covered:** 01/01/2017– 04/30/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset          | Income Type(s)  | Income Current Year to Filing | Income Preceding Year     |
|--|-------|-------------------------|-----------------|-------------------------------|---------------------------|
| 5 Stones Consulting [OL]   | JT    | \$500,001 - \$1,000,000 | Boarding Horses | \$15,001 - \$50,000           | \$15,001 - \$50,000       |
| LOCATION: Ashland City, Montgomery Co, TN, US  |       |                         |                 |                               |                           |
| DESCRIPTION: This is the entity through which our horse boarding operations are conducted.   |       |                         |                 |                               |                           |
| A Night With Saddam published by Lulu Press [IP]   |       | \$1,001 - \$15,000      | Royalties       | \$201 - \$1,000               | \$1 - \$200               |
|  |       |                         |                 |                               |                           |
| Alianz Master Dex F Fixed Annuity [FN]   |       | \$50,001 - \$100,000    | Tax-Deferred    |                               |                           |
|  |       |                         |                 |                               |                           |
| Align MD [OL]  |       | None                    | Capital Gains   | \$1,000,001 - \$5,000,000     | \$1,000,001 - \$5,000,000 |
| LOCATION: Clarksville/Montgomery Co, TN, US  |       |                         |                 |                               |                           |
| DESCRIPTION: Sale of 100% Ownership in Align MD to APP Hold Co payments over 3 years ending Nov 2017. Current value of ownership is none and payments to me are complete as of NOV 2017. |       |                         |                 |                               |                           |
| APP Hold Co [PS]   |       | None                    | Capital Gains   | \$1,000,001 - \$5,000,000     | \$1,000,001 - \$5,000,000 |
|  |       |                         |                 |                               |                           |
| DESCRIPTION: Sale of stock in a privately held company.  |       |                         |                 |                               |                           |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Authentically American Apparel [PS]                                      | SP           | \$100,001 - \$250,000 | Dividends             | None                                 | None                         |
| DESCRIPTION: Apparel company in Brentwood, TN.                           |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ AXA IRA Cash Account [IH]                       |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Consumer Discretionary Select Sector SPDR [EF]  |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares 10+ Year Credit Bond [EF]               |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares 1-3 Yr Credit Bond [EF]                 |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares Core U S Aggregate Bond [EF]            |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares IBOXX \$Investment Grade Corp Bond [EF] |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares MSCI France [EF]                        |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares MSCI Germany [EF]                       |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares MSCI Hong Kong [EF]                     |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares MSCI Japan [EF]                         |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares MSCI Switzerland Capped [EF]            |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares MSCI UTD Kingdom New [EF]               |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |
| AXA Retirement Account ⇒ Ishares Russell 1000 [EF]                       |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
|  |              |                       |                       |                                      |                              |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b>      | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|----------------------------|-----------------------|--------------------------------------|------------------------------|
| AXA Retirement Account ⇒<br>Ishares Russell 2000 [EF]                          |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Ishares U S Trust Short Maturity Bond<br>[EF]      |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Sector Consumer Staples Select Sector<br>SPDR [EF] |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Sector Energy Select Sector SPDR [EF]              |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Sector Healthcare Select Sector SPDR<br>[EF]       |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Sector Materials Select Sector SPDR ETF<br>[EF]    |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Sector Technology Select Sector SPDR<br>[EF]       |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Spdr Bloomberg Barclays Intl Treasury<br>Bond [EF] |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| AXA Retirement Account ⇒<br>Vanguard Telecom Services ETF [EF]                 |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| Birch Creek Properties ⇒<br>Loans from Birch Creek to Colson<br>Services [DO]  | JT           | \$500,001 -<br>\$1,000,000 | Interest, Rent        | \$15,001 - \$50,000                  | \$15,001 - \$50,000          |
| Birch Creek Properties ⇒<br>Rental Property [RP]                               | JT           | \$250,001 -<br>\$500,000   | Rent                  | \$5,001 - \$15,000                   | \$5,001 - \$15,000           |
| LOCATION: Ashland City, Montgomery Co, TN, US                                  |              |                            |                       |                                      |                              |
| Birch Creek Properties ⇒<br>Rental Property [RP]                               | JT           | \$100,001 -<br>\$250,000   | Rent                  | \$5,001 - \$15,000                   | \$5,001 - \$15,000           |
| LOCATION: Clarksville, Montgomery Co, TN, US                                   |              |                            |                       |                                      |                              |
| Birch Creek Properties ⇒   | JT           | \$250,001 -                | Rent                  | \$5,001 - \$15,000                   | \$5,001 - \$15,000           |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Westchester Properties [RE]   |              | \$500,000             |                       |                                      |                              |
| DESCRIPTION: Rental properties in Nashville, TN.                            |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Capitol [RP]   | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Carter [RP]    | JT           | \$50,001 - \$100,000  | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Meadow [RP]    | JT           | \$100,001 - \$250,000 | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Neelys' 1 [RP] | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Neelys 2 [RP]  | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Anderson [RP]    | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Grenada [RP]     | JT           | \$100,001 - \$250,000 | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Kenmore [RP]     | JT           | \$50,001 - \$100,000  | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Oakdale [RP]     | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| LOCATION: Nashville, TN, US   |              |                       |                       |                                      |                              |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Oneida [RP]<br><br>LOCATION: Nashville, TN, US        | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Porter [RP]<br><br>LOCATION: Nashville, TN, US        | JT           | \$50,001 - \$100,000  | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Richmond Hill [RP]<br><br>LOCATION: Nashville, TN, US | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Westhchester [RP]<br><br>LOCATION: Nashville, TN, US  | JT           | \$15,001 - \$50,000   | Rent                  | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Colo-Labs Research Company Medical Lab Tests [PS]<br><br>DESCRIPTION: Medical laboratory in Knoxville, TN.       |              | \$50,001 - \$100,000  | Dividends             | None                                 | None                         |
| Dia-Tech Oncology [PS]<br><br>DESCRIPTION: Oncology services in Franklin, TN.                                    |              | \$15,001 - \$50,000   | Dividends             | None                                 | None                         |
| ETFIS SER TR I Infracap Active MLP [EF]  |              | \$250,001 - \$500,000 | Dividends             | None                                 | None                         |
| Franklin Conservative Allocation FD CL B [MF]  |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Gold [CO]  |              | \$1,001 - \$15,000    | Capital Gains         | None                                 | None                         |
| Hytch [DO]   | SP           | \$100,001 - \$250,000 | Interest              | None                                 | None                         |
| IRA Innovations Self Directed IRA ⇒ Cash Account [IH]  |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| IRA Innovations Self Directed IRA ⇒ Note Receivable from Colson Services [DO]                                    |              | \$100,001 - \$250,000 | Tax-Deferred          |                                      |                              |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b>      | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|----------------------------|-----------------------|--------------------------------------|------------------------------|
| Loan to APP Hold Co [DO]                                       |              | \$5,000,001 - \$25,000,000 | Interest              | None                                 | None                         |
| Loan to Luke Stair [DO]  |              | \$15,001 - \$50,000        | Interest              | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Midland Fixed Annuity IRA [FN]                                 |              | \$1,001 - \$15,000         | Tax-Deferred          |                                      |                              |
| Northwestern Brokerage Investment Account Cash [BA]            |              | \$1,001 - \$15,000         | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Oppenheimer Steelpath MLP Income CL A [EF]                     |              | \$1,000,001 - \$5,000,000  | Dividends             | \$100,001 - \$1,000,000              | None                         |
| Rural Physician Partners PLLC [PS]                             |              | \$250,001 - \$500,000      | Dividends             | None                                 | None                         |
| DESCRIPTION: Healthcare provider in Franklin, TN.              |              |                            |                       |                                      |                              |
| Silver [CO]  |              | \$1,001 - \$15,000         | Capital Gains         | None                                 | None                         |
| State Farm Anuity [FN]   |              | \$250,001 - \$500,000      | Dividends             | \$15,001 - \$50,000                  | \$15,001 - \$50,000          |
| State of TN 401(k) ⇒ Allianz NFJ Large Cap Value Instl [MF]    |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒ Brown Capital Small Company Inv [MF]      |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒ Columbia Mid Cap Value Instl [MF]         |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒ DFA International Value I [MF]            |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒ Fidelity International Discovery [MF]     |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒ Fidelity Puritan [MF]                     |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒ Invesco Van Kampen Small Cap Value Y [MF] |              | \$1 - \$1,000              | Tax-Deferred          |                                      |                              |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b>    | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|---|--------------|--------------------------|-----------------------|--------------------------------------|------------------------------|
| State of TN 401(k) ⇒<br>Vanguard Institutional Index I [MF]           |              | \$1 - \$1,000            | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒<br>Vanguard Total Bond Market Index Inst<br>[MF] |              | \$1 - \$1,000            | Tax-Deferred          |                                      |                              |
| State of TN 401(k) ⇒<br>Voya Fixed Fund [MF]                          |              | \$1 - \$1,000            | Tax-Deferred          |                                      |                              |
| State of TN 457 Plan ⇒<br>Alliance NFJ Large Cap Value Instl [MF]     |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| State of TN 457 Plan ⇒<br>Brown Capital Small Company Inv [MF]        |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| State of TN 457 Plan ⇒<br>Columbia Mid Cap Value Instl [MF]           |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| State of TN 457 Plan ⇒<br>Fidelity International Discovery [MF]       |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| State of TN Consolidated Retirement<br>System [FN]                    |              | \$15,001 - \$50,000      | Tax-Deferred          |                                      |                              |
| Visible Pictures LLC Movie Production<br>Loan [DO]                    |              | \$100,001 -<br>\$250,000 | Interest              | None                                 | None                         |

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

#### SCHEDULE C: EARNED INCOME

| <b>Source</b>                             | <b>Type</b>   | <b>Amount Current Year to Filing</b> | <b>Amount Preceding Year</b> |
|---|---------------|--------------------------------------|------------------------------|
| State of Tennessee                        | Salary        | \$45,627.00                          | \$24,235.00                  |
| American Physician Partners (APP Hold Co) | Salary        | \$75,000.00                          | \$275,000.00                 |
| Crossfit Solafide                         | Spouse Salary | N/A                                  | N/A                          |

#### SCHEDULE D: LIABILITIES

| <b>Owner Creditor</b> | <b>Date Incurred</b> | <b>Type</b>               | <b>Amount of Liability</b> |
|-----------------------|----------------------|---------------------------|----------------------------|
| F&M Bank              | November 2017        | Personal loan.            | \$500,001 - \$1,000,000    |
| Republic Bank         | OCT 2011             | Loan on a rental property | \$100,001 - \$250,000      |
| Republic Bank         | June 2012            | Loan on Rental Property   | \$50,001 - \$100,000       |
| Planters Bank         | Dec 2015             | Loan on Rental Property   | \$15,001 - \$50,000        |
| Planters Bank         | Dec 2015             | Loan on Rental Property   | \$15,001 - \$50,000        |
| Planters Bank         | Dec 15               | Loan on Rental Property   | \$15,001 - \$50,000        |
| Planters Bank         | Mar 2016             | Loan on Rental Property   | \$15,001 - \$50,000        |
| Republic Bank         | June 2016            | Loan on Rental Property   | \$50,001 - \$100,000       |

## SCHEDULE E: POSITIONS

| <b>Position</b>                | <b>Name of Organization</b>               |
|--------------------------------|---|
| Division President             | American Physician Partners               |
| COMMENTS: Ended April 1, 2017. |   |
| Director                       | Soldiers & Families Embraced              |
| Director                       | Reboot for Recovery                       |
| President                      | Health Professions Insurance Company, LLC |
| President & CEO                | Linden Risk Management LLC                |
| President & CEO                | 5 Stones Consulting                       |
| Chairman of the Board          | Bunker Labs                               |
| Director                       | Boy Scouts of America                     |
| President                      | Two Rivers Medical Foundation             |

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- AXA Retirement Account
- Birch Creek Properties (100% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: This is a real estate investment entity with loans to other entities, properties that it rents to individuals, etc.
- Birch Creek Properties ⇒ Westchester Properties (26% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: This company rents individual houses, and small 2 - 4 unit town homes.
- IRA Innovations Self Directed IRA
- State of TN 401(k)
- State of TN 457 Plan

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes  No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes  No

## CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Dr. Mark Green , 01/25/2019